

INSTRUCTIONS – CONSERVATOR’S EX PARTE PETITION AND ORDER TO EXPEND FUNDS

Expenditures outside the normal spending circumstances for your conservatorship should be approved by the court. What is “normal” will vary from case to case and may include any expenditure if the primary goal of the conservatorship is to hold funds for later distribution to the protected person (often the case in the conservatorship of a minor). Check with your court for any established spending guidelines.

Note that the “Ex Parte” petition is requesting that the court consider the request without requiring a notice or hearing, but the court may decide to require notice and/or a hearing before considering your request. Follow instructions from the court if a hearing is scheduled.

STEP 1: Complete the *Ex Parte Petition to Expend Funds* stating the amount you want to spend, what you want to use the funds for and providing any available supporting documentation.

STEP 2: Complete the *Order to Expend Funds* leaving the amount authorized and the date lines blank.

STEP 3: File both forms with the court that has jurisdiction of your case. There is no court fee to file this petition.

STEP 4: Proceed with the expenditure only if approved by the court.

STEP 5: Retain a copy of the signed order with the supporting documentation for your annual account for the year in which the expenditure was made.